Business Information Warehouse
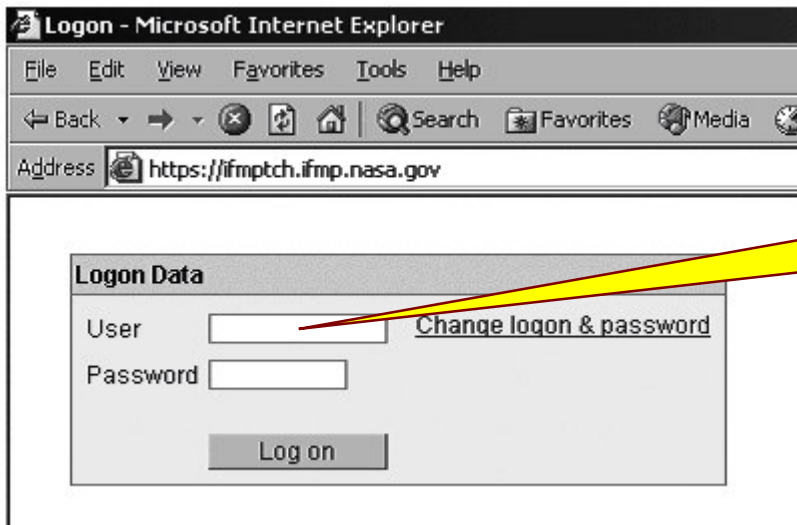
Web Reporting

End User Guide

BW Version 3.0B
Last Modified: Jan 30, 2004

Created by: BW Competency Center
Revised by: DFRC BW Team

Accessing your Web Reporting Environment

Before you can run or create reports and graphs from your reporting environment, you must sign on to Business Warehouse (BW) web site.

1. Launch your Web Browser and enter the following URL https://ifmptch.ifmp.nasa.gov
    The Logon page opens:

Your user ID is Dryden Unique ID

2. Type your user ID and password for BW
3. Click the Log on button

If you did not enter your correct user ID or password, BW prompts you back to the Logon page again.

If this is your first time logging in, you'll be required to change your password.

Change Password

This is an initial password that must be changed

User	DF004510
Current password	
New password	
Repeat Password	

Copy

Enter your new Password & press Copy

Change Password

This is an initial password that must be changed

User	DF004510
Current password	********
New password	********
Repeat Password	********

Copy

Change Password

The password was changed

Continue

Once the user ID and password are validated, a security information window displays. Choose YES for it to let you into the main BW menu.
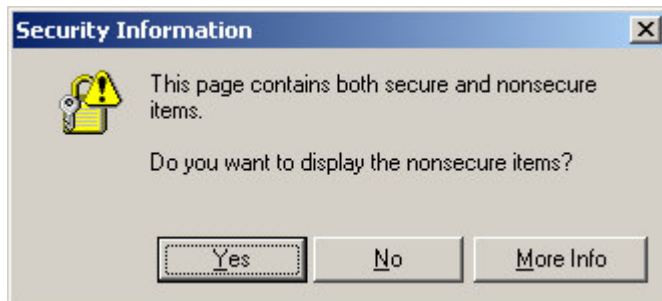
# Using the Web Reporting Environment

In the Web Reporting Environment, you can run a pre-defined report that your Administrator creates and stores in a group folder of subgroup folder.

You can also create and edit reports, manipulate data in an existing report, and save reports that meet your individual needs by using the query tools.

Before you can produce a report or graph in your reporting environment, you must choose a folder from the main tree.
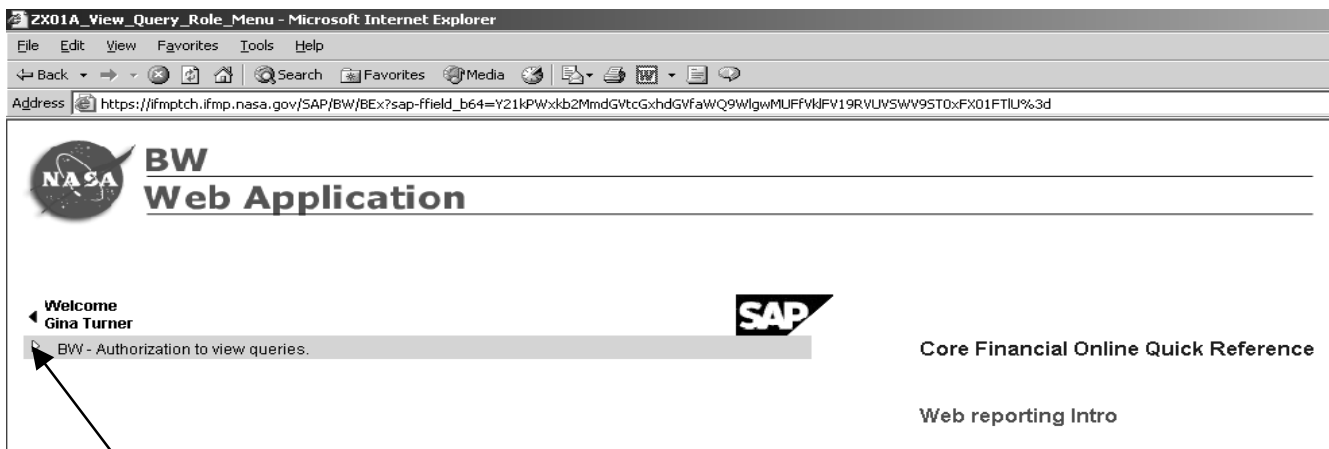
When you **click** on the arrow, BW will expand the contents of those folders.
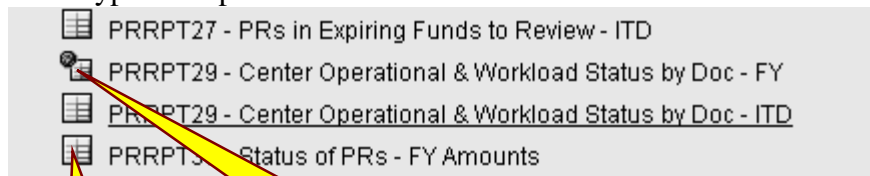

Click on this arrow to drill down (or collapse) further into the list of the reports
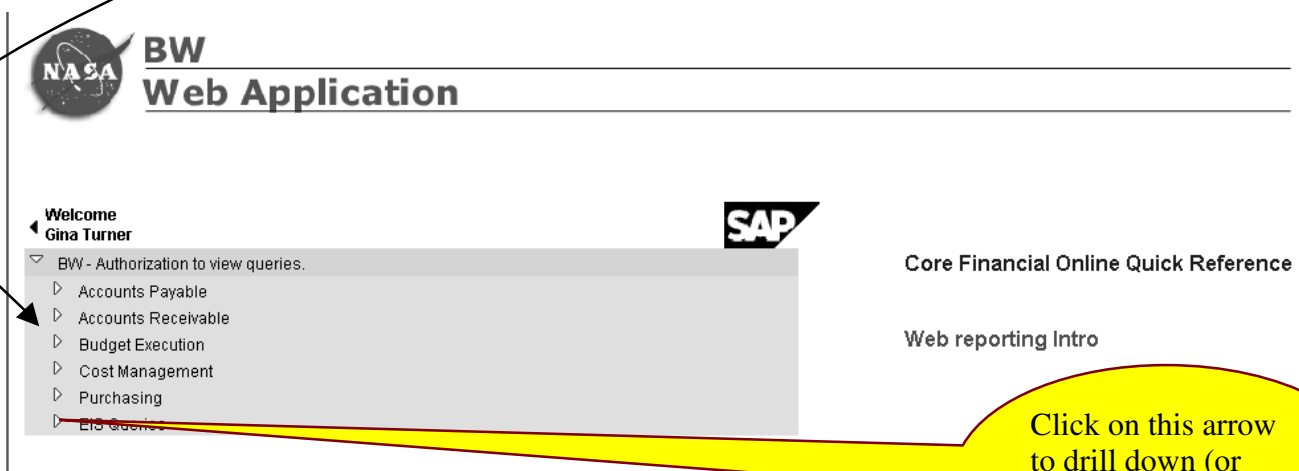
Currently, there are **SIX** main folders in the BW Reporting. See the *attachment* for the description of each report.

Reports Navigation

When you access each folder, you only view the reports, tables, and other metadata objects grouped under the selected topic by the Administrator.
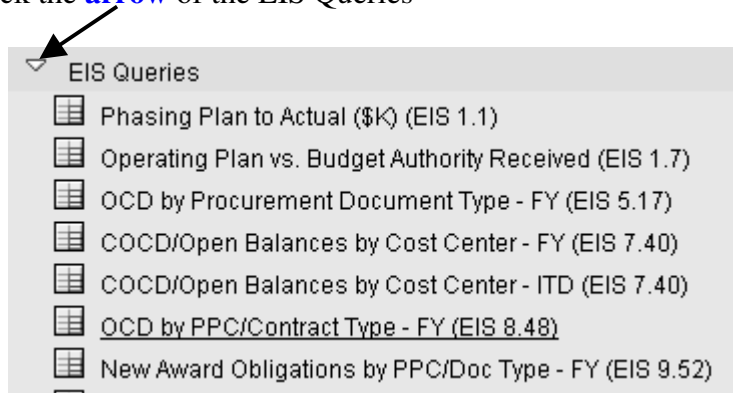
1. Different type of Reports

    PRRPT27 - PRs in Expiring Funds to Review - ITD
    PRRPT29 - Center Operational & Workload Status by Doc - FY
    PRRPT29 - Center Operational & Workload Status by Doc - ITD
    PRRPT3... Status of PRs - FY Amounts

    This sign meaning this Report builds on default template

    Report builds on non-default template because it required a lot of linkages from multiple tables and queries

2. Click the **arrow** of the EIS Queries

    EIS Queries
    Phasing Plan to Actual ($K) (EIS 1.1)
    Operating Plan vs. Budget Authority Received (EIS 1.7)
    OCD by Procurement Document Type - FY (EIS 5.17)
    COCD/Open Balances by Cost Center - FY (EIS 7.40)
    COCD/Open Balances by Cost Center - ITD (EIS 7.40)
    OCD by PPC/Contract Type - FY (EIS 8.48)
    New Award Obligations by PPC/Doc Type - FY (EIS 9.52)
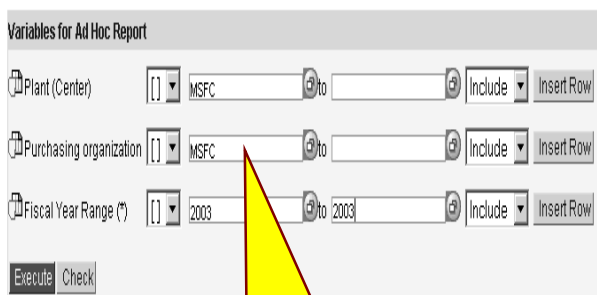
3. Let's pick the report "OCD by PPC/Contract Type" to go into detail

4. A new window pops up. This is called "Variables for Ad Hoc Report Window". This is the place to provide the ability to select specific parameters for the execution of the query.

Variable Screens

Variables are parameters of a query that you defined in the Query Designer and that are filled with values when you execute the query or Web application. They serve as a store for characteristic values, hierarchies, hierarchy nodes, texts and formula elements, and can be processed in different ways.

Note: Any text box from window that appears by invoking any BW buttons has become case sensitive
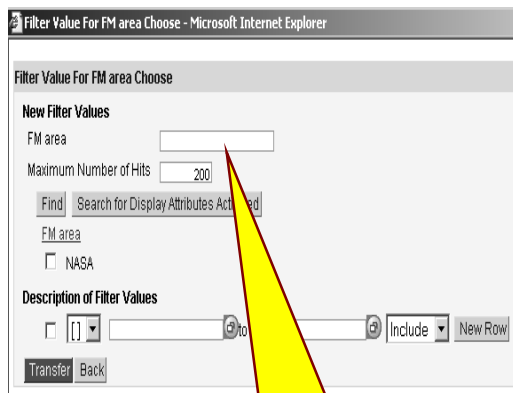

Not Case Sensitive

Case Sensitive

Use the Help Value

- This button is used for a hint of help.
- Click on this button will open the "Value Selection for …" window up.
- At this time, you may either **click** on the value or **key into** this box for faster execution
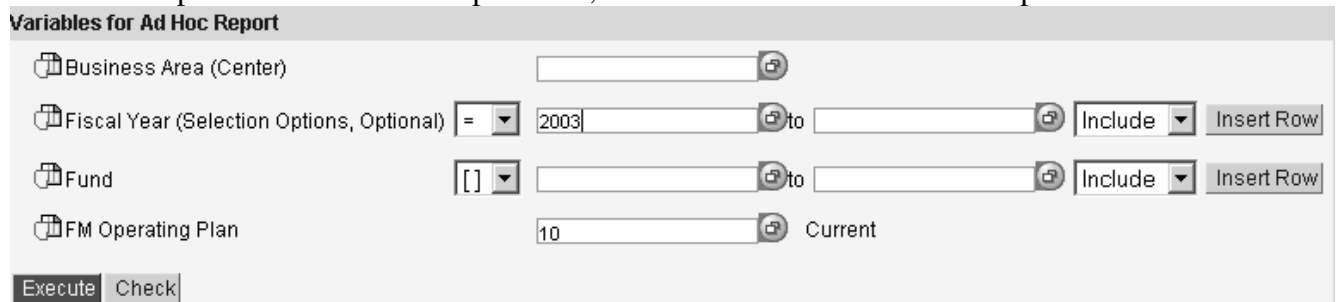
- A drop down selection includes: range, equal, less than, greater than, wild card which means "like"
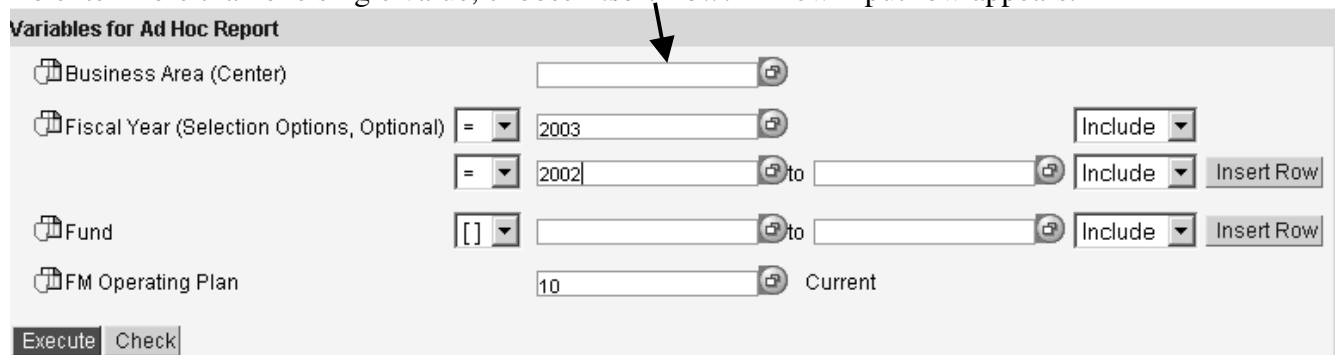

To enter a single value

- From the dropdown box select the operator =, and enter the value in the first input field.

- Do not change the *include* setting.

- To enter more than one single value, choose *Insert Row*. A new input row appears.

To enter a Value Range or Interval
- From the dropdown box, choose the operator [] to define an interval and enter the **lower limit** of the interval in the first input field and the **upper limit** of the interval in the second input field

- Do not change the *include* setting.
- To enter more than one value range, choose *Insert Row*. A new input row appears

Note – Alternatively, you can select one of the operators <, <=, >, => from the dropdown box and enter the upper or lower limit of the value range in the first input field.

To exclude single values and value ranges

- Enter the single value or value range (as above)
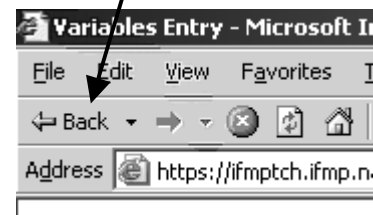- Change the *include* setting to *exclude* in the dropdown box.

- To exclude more than one single value or value range, choose *Insert Row*. A new input row appears.

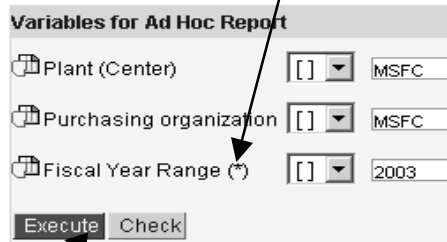   If you have more selections, you may also **insert** a new row

- You **CAN NOT** undo the "insert row", however, you can use the "**back**" button from the Explorer Browser to take out the new row

- Note: Anywhere you see the **(*)**, it's a **mandatory variable**. It must have a value prior to execute the query.
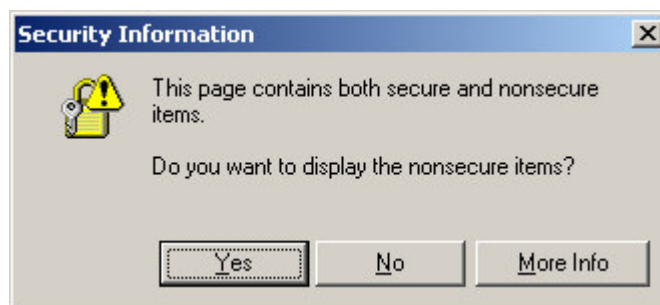

- Once all the variables are entered, click on the **execute** button to run the report
- Before displaying data on screen, a security window open up to check with you if you want to display non-secure items. Just say, "Yes".

Report Lay Out

- Context Menu: will give users a different set of options depending on which part of web report is clicked upon. 3 types of context menu

  o **Navigation Block** Context Menu
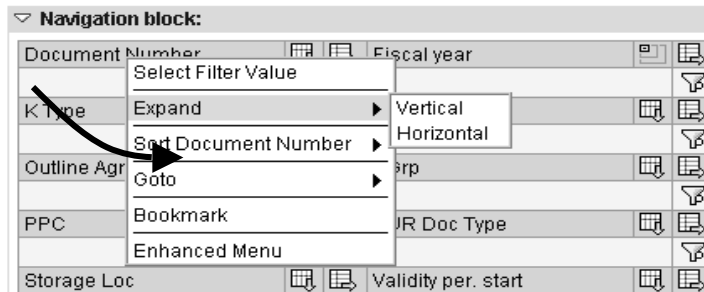
  o **Table Header** Context Menu

  o **Results Area** Context Menu

Menus can also be populated with text, dimensions, or data to allow users to make selections from drop-down lists.

- The analytical options available in the context menu can be divided into
    - o Basic Menu: Core analytical options used most often
    - o Advanced Menu: Basic options plus additional functionality
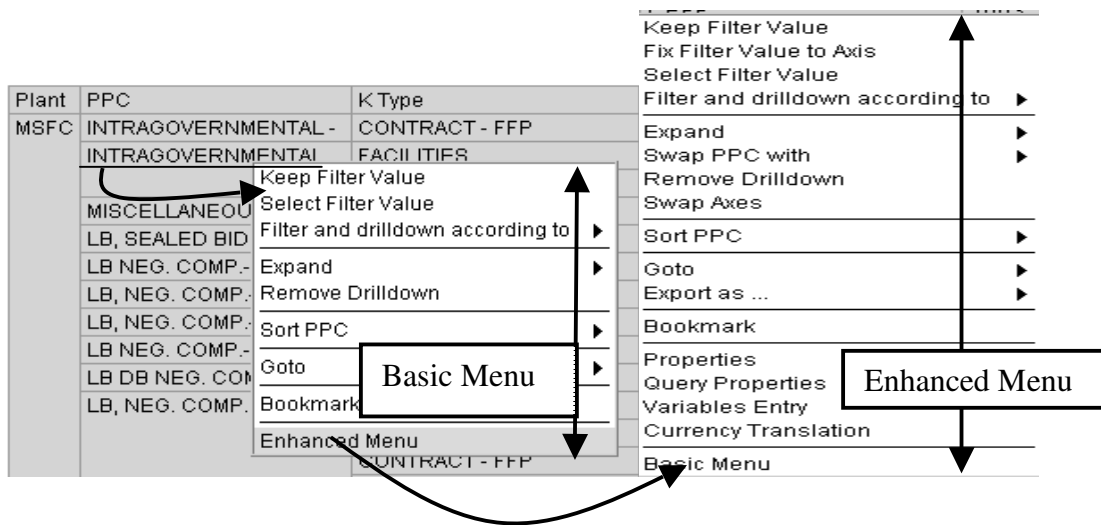
Creating Graph

Generate charts on totals not details
Press bar chart once the totals and displayed.

Export the data into MS-Excel and generate charts and graphics.
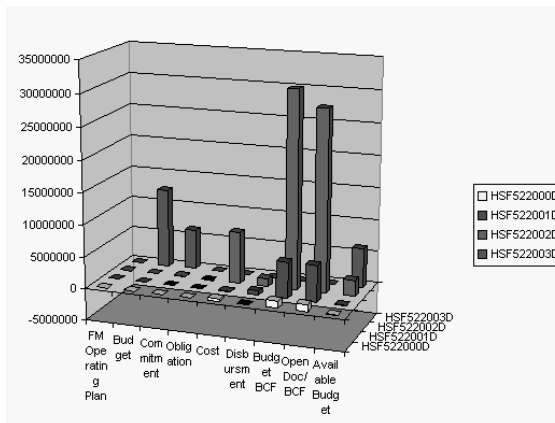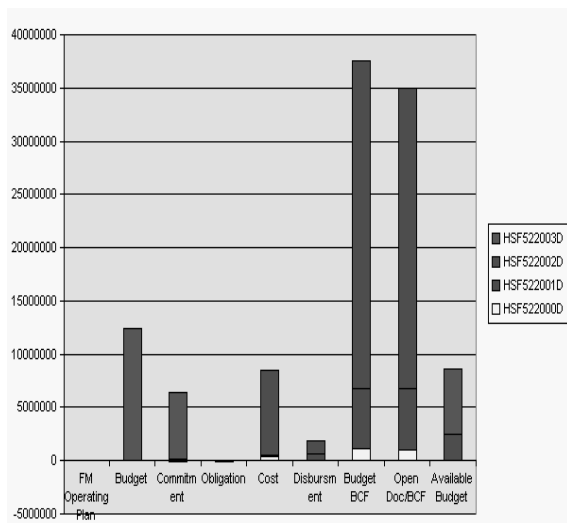
Printing

Small queries can be printed through print screen option

Large queries must be exported to Excel before printing out

Note: See Printing BW Web Report user guide

Bookmark

Bookmarking is a useful feature that allows users save the current format of their query for future user. Using a bookmark will allow a user to avoid opening up the default query each time and doing the same drilldowns each time to make the query appear the way they like

1. Run a BW web query from the Role Menu
2. Perform any need drilldowns or format changes
3. Select the **Bookmark** option from the "Enhanced Context Menu"
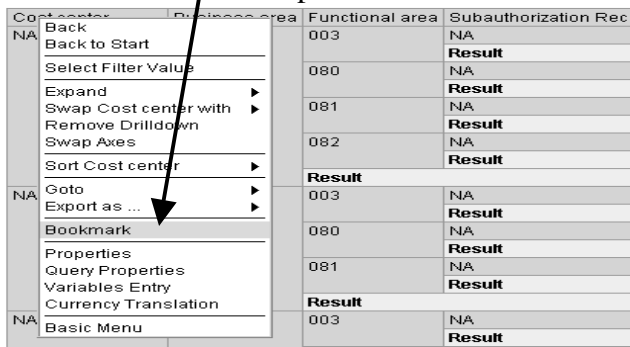
4. The BW Variables Entry re-appears on screen. Click on Favorites → Add to Favorites of the Internet Explorer. In the "Add Favorite" window, just type in the name of the query you want to bookmark. Click 'OK' once done.
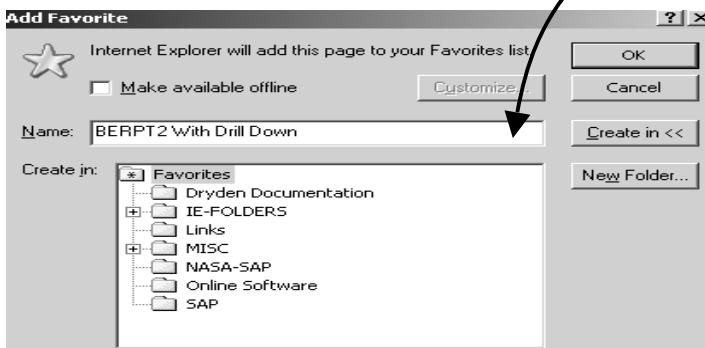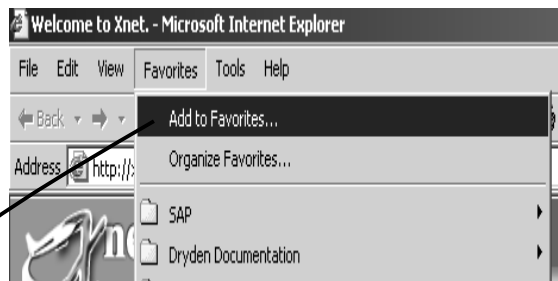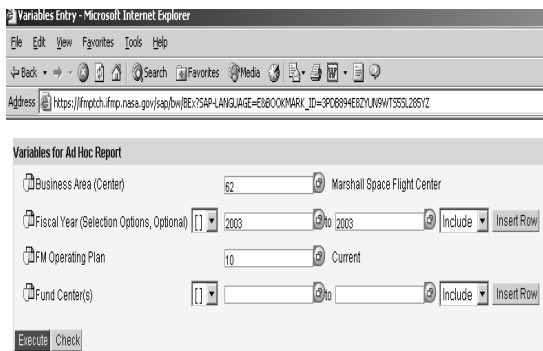
To share this bookmark through e-mail

1. Locate the bookmark: Click on My Computer → Local disk(C:) → Documents and Settings → Your Log in Folder → Favorites → Look for the bookmark name
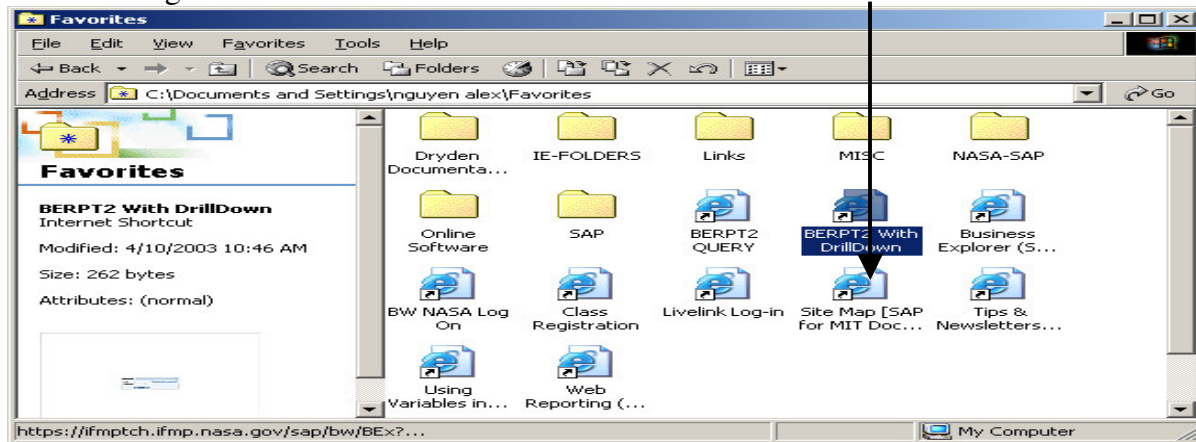
2. Open up Eudora, once you're ready to attach the attachment, just click on the Bookmark name and drop it onto Eudora. Click on the Send button to send off your email.
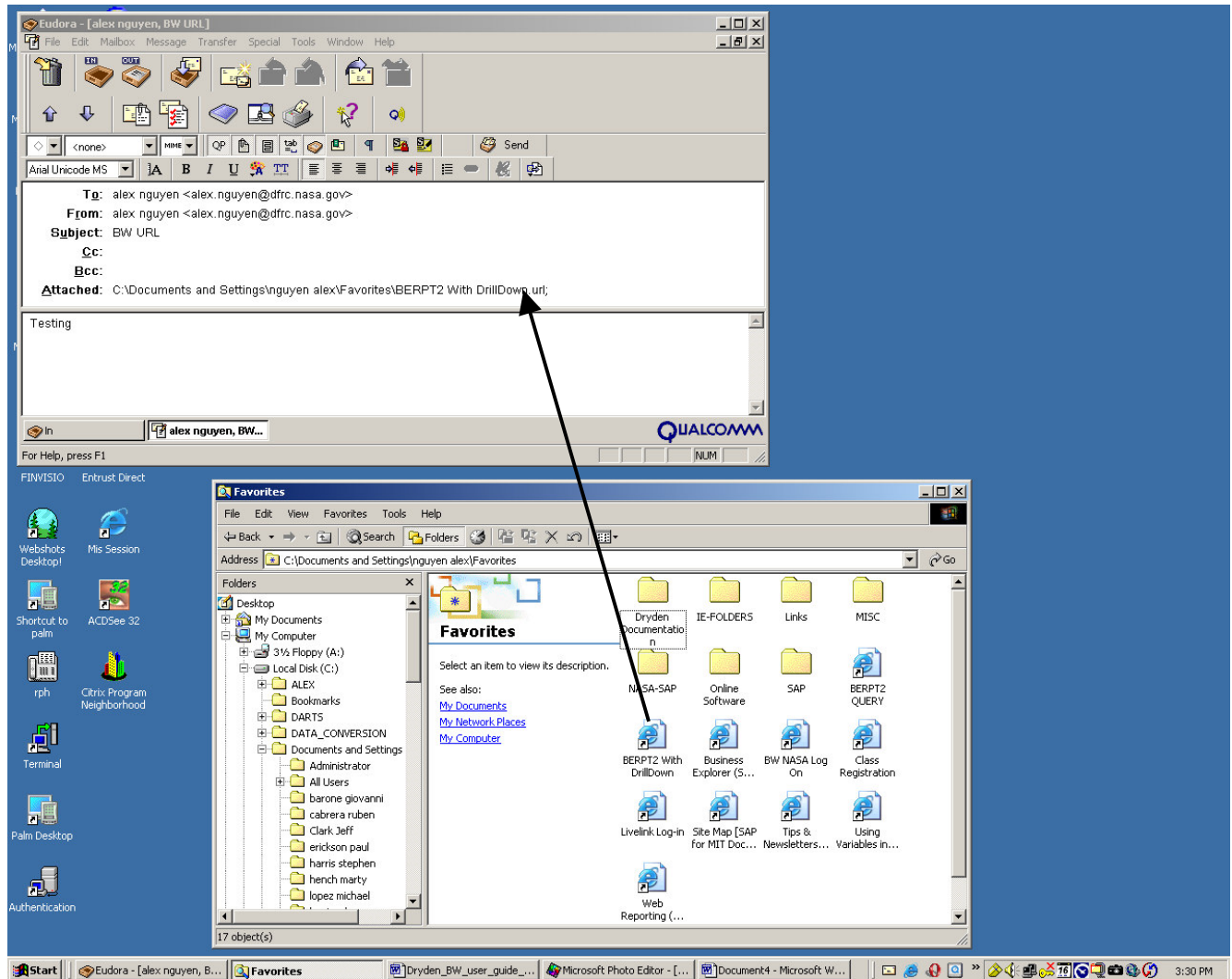
Standard Web Template

The following options available on the gray toolbar are used to manipulate reports:

Table

Bar Chart

Pie Chart

Line Chart

3-D Chart

Swap Axes

Export to Excel

Export to "csv" format
(Comma Separated Value)

Drill Down in Rows

Information

Exceptions

Conditions

Display Variables Entries

Bookmark

Filter

Drill Across in Columns

1. **Navigation Block –** Displays the navigational state of a view in the Web report in the form of a table. All characteristics and structures in the view are listed in the table and their filter values are displayed. You can also change the navigational state. You can transfer characteristics and structures to an axis (rows or columns) or from axes. You can filter according to single values and remove the filter again.
2. **Characteristics –** Fields that organize the data and delineate levels of detail in a query
3. **Table –** An item that receives data from a view, and uses it to create a table for a Web report. In addition to the table, there are also navigation links. The table displays the values for a view in a Web report. Characteristics and structures are displayed in the rows and in the columns.

4. **Key Figures –** Amounts or numerical values that can be summed or aggregated

Definition of the Options

Add drilldown according to – You can add a characteristic (for example, Region) to the drilldown at a specified position

Back – Go back to previous action

Bookmark – Capturing a certain state of a query in a single Web link (URL) for future use

Bookmark With Data – Capturing a certain state of a query in a single Web link for future use. When you call up the bookmark (URL), not only does the retained navigation status appear in the Web application, but also the historical data from the time the bookmark was set.

Calculate Results as – Selects the results calculation. I.e: Summation, Average, etc

Calculate Single Values as – Use this function to recalculate the single values that are displayed in the query according to the following criteria: Normalize result, normalize total result, normalize query sum, ranked list, and Olympic ranked list

Conditions – Display the status of the conditions for a view in the form of a table. All the conditions that it is possible to apply to the current navigation status for the view are listed. With every condition, the status of that condition is also displayed active/not active or not applicable/not used. You use the symbol to activate/deactivate the conditions.

Cumulated – Use this function to cumulate the individual cells in an area. The first value is added to the second value, the result is added to the third value, and so on. In the columns the cells are cumulated from top to bottom, and in the rows, the cells are cumulated from left to right. With blocks of single values, that is, a drilldown in both the rows and the columns, the values are cumulated from top to bottom and from left to right.
> This function is particularly useful with drilldowns on time characteristics (months, for example). Using the function *Calculating Single Value* as → *Normalize Results*, and *Sort* → *Descending*, on the corresponding value column, you get a cumulated list that is often described as an ABC list.

Currency Translation – You can specify the currency into which the key figures and structure components of a query are to be translated.

Drilldown – Is used to change the position of a characteristic or a structure for one or more views

Drilldown → Across or Down – you can choose this function in the navigation block or on a label for characteristic descriptions (for example, country) in order to drill down the characteristic in the axes for the columns or rows

Drilldown Nodes According to – in a hierarchically displayed characteristic, you can drilldown on a hierarchy mode according to the next object on the axis and see the values relating to this object underneath it

Exceptions – Display the state of the exceptions for a view in the form of a table. For each exception, the state of the exception (active/not active) is also displayed. You can activate or deactivate the exceptions using the ⚙ symbol.

Expand/Collapse Hierarchy Nodes – Select a characteristic for drilldown, view more detail by placing the characteristic in a column. Use this functio0n to show the different levels of the hierarchy. Alternatively, click on the hierarchy symbol to expand the hierarchy.

Export as… – Selects file type for export of query data. Options: Excel or "csv"

> **MS Excel 2000 File** – You can export query data to MS Excel 2000. The navigation status does not change and the formatting is transferred. You can see the filter restrictions and the data in the table. Exceptions are highlighted in color in the same way as on the Web

> **CSV File** – In contrast to exporting to MS Excel 2000, you do not see the context of the numbers and you cannot see the filter data. The query formatting (such as the exceptions being displayed) is not transferred to the CSV file.

Filter – is used to set filter values for characteristics and structures within a view. It is possible to set several filters for the same characteristic/structure, or the same filter for several different characteristics/structures. Display the filter values that have been generated by navigating in a view. You also use filters to select individual values.

Filter and drilldown according to → "**Name of the Characteristic**" – you can fix a characteristic to a value in one-step (meaning to filter it) and drilldown according to another characteristic on the same axis (row axis or column axis).

Fix Filter Value to Axis – Has the effect that you see only the data for a characteristic value. The characteristic value itself remains in the drilldown

Goto – Allows links to other queries to find additional or more detailed data. This function will pass filter criteria to the receiver query and enable you to jump to documents and jump targets using the report/report interface.

Keep Filter Value – Has the effect that you see only the data for a characteristic value. The characteristic value itself is removed from the drilldown. Only data referring to that value is displayed

Key Figure Definition – Provides information about how a concrete number is concatenated in your Web application. You can check whether data has been loaded and analyze errors.

Properties – Specify the display properties of "the characteristics" and key figures

Query Properties – You can make various settings that affect the query during runtime here.

Remove Drilldown – to remove a characteristic or a structure from the drilldown, for one or more views.

Remove Filter – Use to remove the filter from a characteristic or a structure for one or more views.

Select Filter Value – Allows the user to choose a characteristic value, or series of values, that will restrict the returned data set

Sort "Name of the Characteristics" – Arranges result values in ascending or descending order; a) sort by Key or Name, b) sort by value for key figures

Swap "Name of the Characteristics 1" with "Name of the Characteristic 2" – Changes the position of two drilldown characteristics

Swap Axes – You use this function to swap the query axes. If you have characteristics in the rows and key figures in the columns and you choose *Swap Axes*, then the key figures are displayed in the rows and the characteristics are displayed in the columns

Swap Key Figures with –

Switch Characteristics/Structures – to remove a characteristic or a structure from a characteristic or a structure, for one of more views

Variables Entry – Takes user back to variable entry screen to choose new values, new values will be applied to current analysis

Structure of the Context Menu

Functions in the context menu for characteristic *descriptions*	Functions in the context menu for characteristic *values*	Functions in the context menu for *structural components*
• Back • Back to Start • Select Filter Value • Drilldown → Across or Down • Exchange Characteristic1 with Characteristic 2/Structure • Remove Drilldown • Swap Axes • Sort Characteristic 1 → Ascending According to key/Ascending According to Name/Descending According to Name • Goto → Display documents/Documents for Navigation Status • Currency Translation • Bookmark • Export as→CSV file/MS Excel 2000 file • Properties (characteristic) • Query Properties	• Back • Back to Start • Keep Filter Value • Keep Filter Value on Axis • Select Filter Value • Filter and Drilldown According to→ Characteristic 2 • Drilldown → Characteristic 2 • Exchange Characteristic1 with Characteristic 2/Structure • Remove Drilldown • Swap Axes • Sort Characteristic 1 → Ascending According to key/Ascending According to Name/Descending According to Name • Goto → Display documents/Documents for Navigation Status • Currency Translation • Bookmark • Export as→CSV file/MS Excel 2000 file • Properties (characteristic) • Query Properties	• Back • Back to Start • Keep Filter Value • Keep Filter Value on Axis • Select Filter Value • Filter and Drilldown According to→ Characteristic 2 • Drilldown → Characteristic 2 • Exchange Structure with → Characteristic • Swap Axes • Sort →Sort Ascending/Sort Descending • Calculate Result as→(not Defined)/ Summation/ Maximum/ Minimum/ Count All Values<>0/ Average of All Values/ Average of all Values<>0/ Standard Deviation/ Variance/ Suppress Result/ First Value/ Last Value • Calculate Single Values As → (Not Defined)/ Normalization of Result/ Normalization of Total Result/ Normalization of Query Total/ Ranked List/ Ranked List (Olympic) • Cumulated • Goto → Display documents/Documents for Navigation Status • Currency Translation • Bookmark • Export as→CSV file/MS Excel 2000 file • Properties (Key figure) • Key Figure Definition • Query Properties